



Canadian Association of Government Finance Officers
Formerly GFOA of Western Canada

Preconference Professional Development Sessions 2019

What:

We will be offering 3 separate sessions the day prior to our annual conference

- **Asset Management for Finance Officers**
- **Data Analytics & Dashboards**
- **Financial Policies and Planning: Going to the Next Level with the new GFOA Financial Foundations Framework**

Detailed outlines below

When:

October 1st, 2019 from 8:30am to 4:30pm

Where:

Sheraton Vancouver Airport Hotel, Richmond B.C.

Why:

Participants can save money on travel by combining their professional development with our annual conference for up to 24 verifiable hours.

How to register:

Each of the sessions costs \$400 plus GST

Register for a session and/or the conference

<https://www.civicinfo.bc.ca/event/2019/CAGFO>

There are minimum and maximum numbers for each course. Please register early to avoid disappointment.

Asset Management for Finance Officers

Course Objectives:

- Get confidence with asset management concepts, terms and practices through the eyes and perspective of an accounting professional
- Get familiarized with the roles of a financial professional in asset management functions
- Understand how the asset management industry has evolved, and bench mark your activities and organization's position

Topics Include:

- Introduction to asset management and its components
- Asset management governance and policy framework
- Developing asset management components such as risk and condition models
- Developing a sustainable financial model: assumptions and considerations
- Developing a performance model, and industry accepted CSFs and KPIs

Who Should Attend:

Senior and mid-level professional accountants and financial analysts responsible for asset management functions: asset accounting, asset risk modelling, and sustainable asset replacement funding, from both government and private sectors, and interested in overall understanding of asset management concepts, elements and tools.

Benefits of Attending:

- Shatter myths about asset management and get a complete understanding
- Gain skills in developing asset management governance frameworks and policies
Understand the relationship of asset management elements to the big picture, and a financial professional's role in it, through a hands-on workshop
- Learn how to develop a sustainable financial model from the developers of an award winning sustainable financial model
- Learn how to develop performance measures, and a financial professional's role in monitoring and reporting asset management economics and sustainability

About the Instructors:

Speaker /Trainer: **Jude Pillainayagam, MBA, P. Eng., MIAM**

Jude Pillainayagam is a senior engineer in municipal engineering sector over 20 years and the Asset Management Engineer at the City of Coquitlam. Jude possesses a diverse educational background and experience. Jude is also an accountant and a certified Information System Professional. He is a member of Canadian Network of Asset Managers (CNAM) and the Institute of Asset Management (IAM), UK and he has carried out extensive work in the area of asset management.

Speaker/Trainer: **Michelle Hunt, CPA**

Michelle is the General Manager of Finance and Technology at the City of Coquitlam and was instrumental in developing the UBCM award winning "Sustainable Asset Management Funding Framework." Michelle has over 20 years of public sector experience in finance and related areas and has worked in asset management from both the governance and operational perspectives.

Data Analytics & Dashboards

Course Objectives:

Finance departments are collecting and communicating more data than ever. Using multiple solutions including numerous spreadsheets, ERP and budget software to collect, analyze and process the data is not unusual. Acquiring, cleaning, compiling and presenting this data in an easily digestible way for council, management or other stakeholders can be a monumental/border-line impossible task. Supplying them with well-designed graphical communications will enable rapid comprehension, analysis and decision making. Providing a weak, ill-conceived presentation can be much worse than providing none at all.

This session covers:

- Best practices for communicating complex financial information.
- What can go wrong when data isn't communicated well.
- What makes for a good dashboard?
- Common tools available for performing data analytics and creating dashboards
- How to efficiently and effectively compile and prepare data across multiple solutions,
- Develop practical analytical/presentation skills in Excel, Power BI & Tableau for immediate application in your business processes.

Who Should Attend:

Absolutely everyone who compiles, analyzes and presents data.

Benefits of Attending:

We will teach attendees in real-time how to compile, analyze and present data using Excel and industry leading data analytics tools. Attendees should come equipped with a laptop and [download the free 14-day trial of Tableau](#), one of the above noted industry leading tools. This is not only a theory-based workshop. Attendees will be hands-on creating sophisticated dashboards and analyzing data. This workshop will revolutionize the way you work, analyze and present information, guaranteed.

About the Instructors:

Jamie Black is President of F.H. Black & Company Incorporated. For the last 20 years, he has consulted and trained finance officers, auditors & accountants in government, higher education, and corporations throughout Canada and the U.S. His work focuses on increasing efficiency & effectiveness through the implementation of technology & best practices to ensure that finance departments do more with less, do it better than it was done before and do it in less time.

Darryl Parker is the Manager of RPA and Accounting Automation Services at F.H. Black & Company Incorporated. For over 13 years he has provided technical consultation and training to hundreds of finance departments across North America. As a computer programmer and a designated CPA he is uniquely qualified to identify inefficiencies in business process and apply technological resolutions.

Financial Policies and Planning: Going to the Next Level with the new GFOA Financial Foundations Framework

Course Objectives:

Over the past few years GFOA has been researching a new formula for how local governments can maintain their financial health and thereby contribute to a thriving community. This new formula is based on a Nobel-prize winning body of work about how communities can make better decisions about shared resources, such as a public budget. It builds on the concepts of long-term financial planning and financial policies. It also raises new concepts that are vital to financial health. At this session, you will be introduced to these financial foundations and find out how you can start to put it into practice.

Who should attend:

Anyone who wants their local government to have a strong financial foundation for achieving their community's highest goals.

Benefits of Attending:

- Learn the five foundations of financial health
- Learn what to look for in your community to see if these foundations are in place
- Gain access to a self-assessment tool to guide a conversation about the financial foundations with your colleagues.

About the Instructor:

Shayne Kavanagh is the Senior Manager of Research for GFOA and has been a leader in developing the practice and technique of long-term financial planning and policies for local government. He started GFOA's long-term financial planning and policy line of research in 2002 and has been working with governments on financial planning and policies ever since. He is the author of a number of influential books on financial planning in city government. His forthcoming book, *Financial Foundations for Thriving Communities*, takes a Nobel Prize winning body of work about how to sustain commonly owned natural resources and applies it to a community's commonly owned financial resources: the public budget.